

Chapter 11. Overseas Visits (including exchange visits and expeditions)

SUMMARY OF KEY POINTS – see rest of chapter below for full details

- **All overseas visits (Category 4) should be recorded and submitted for approval to all relevant managers** (for schools, this includes the Educational Visits Coordinator, the Governors, and the Headteacher) using EVOLVE Online. These visits also need authorisation from the Local Authority.
- **Plenty of time (often more than 12 months) is needed for planning overseas visits** as they usually involve a lot of preparation and considerable expense.
- **A minimum staffing ratio of 1 competent adult to 10 group members** (with a minimum of 3 adults overall) is recommended. It is useful if one of the leaders can communicate in the local language, or at least carry a phrase book for use in an emergency. Group members should know how to respond and how to contact the leaders if they become separated from the group.
- **Visit Organisers must check that any tour operator or travel company used is reputable and reliable**, and that adequate financial protection is provided, (especially in the event of insolvency). The Learning Outside the Classroom (LOtC) Quality Badge provides a simple means for party leaders to ascertain that a provider has been inspected and accredited to a level that meets all the usual requirements, but additional information and assurances may be necessary.
- **Passports are needed for all overseas visits**, including day trips, usually in the form of an individual passport for each group member. Passports should be in good condition and valid for at least 6 months from the date of return. Photocopies of the key pages of passports, visas, and other important travel documents should be kept separate and secure by the visit leader.
- **Appropriate travel insurance, which includes cover for cancellation, and medical and other emergency expenses (including repatriation) is a requirement for all overseas visits.** In addition, organisers of visits to other European countries should check that all group members have current and valid EHIC cards which provide reciprocal medical care.
- **Separation from familiar language, culture, customs and laws heighten the need for careful planning, preparation and contingency arrangement, so it is essential that all members of a group know clearly what to expect and what is required of them.** Group members (and their parents/guardians) should also be made aware of the likely standards of accommodation, health services, vehicles, roads and other services, especially if visiting less developed countries where standards may differ from those expected in the UK.
- **Visit Leaders must identify likely health risks in the countries to be visited**, and ensure that group members have all necessary vaccinations and take recommended precautions. Visit organisers must assess and manage the associated risks accordingly. Travel advice should be sought, if appropriate, from the Foreign and Commonwealth Office (FCO).
- **For exchange visits, it is vital that there is close liaison throughout between the schools/establishments involved**, especially regarding the selection and vetting of host families and the organisation of suitable activity programmes. Group members should be able to contact their leaders at any time during an exchange visit if they have any concerns. The Vetting and Barring regulations do not apply to UK-based exchange visits of fewer than 28 days, but overseas parents should be given the opportunity to indicate that they consent to the suitability of the selection process that places their child with the volunteer host family. Group members should understand and accept the ground rules and procedures agreed between with the Group Leader and the host family for domestic living, and any activities and communication/contact arrangements with the Group Leaders. Visit leaders should keep regular contact with all group members and monitor their welfare throughout the visit. Young people should have ready (24hr) access to their Group Leader(s) throughout the stay, and they should be able to alert leaders immediately and confidentially to any serious concerns.
- **Overseas expeditions may present significant additional hazards and organisational challenges, and they require detailed planning.** The LA Educational Visits Officer should be notified of any proposed expeditions before any commitment is made or contract signed. The contract establishing the booking should be written and should be between the establishment and the provider. Staffing numbers and ratios should be based on risk-benefit assessments, taking into account all reasonably foreseeable variables. The gender balance amongst the staff should reflect the make-up of the group. Staff should have substantial and appropriate leadership experience (preferably in similar environments) and appropriate qualifications. A training and induction programme for all group members should be included as part of the preparation. It is recommended that the Visit Organiser attends an “Overseas Visits Planning and Leadership” course (organised by the LA) or the one-day “RGS Overseas Expeditions and Fieldwork Course”. The provider’s Expedition Leader(s) must be technically competent, with appropriate experience of working in similar environments. Responsibility for the pastoral care of the group rests with the leaders from the school/establishment. Appropriate emergency procedures and contingency plans should be agreed and in place before departure. Any swimming activities, including open water bathing, require special consideration.
- **For specific guidance regarding ski/snowsport visits, go to chapter VG 8.28**

11.1 Planning overseas visits

- Overseas visits can be hugely rewarding, but it is important that careful preparation takes place. Much of the other advice in this Guidance document applies also to visits abroad, but there are some additional factors that need to be considered, not least because the legislation may be different from that of the UK and different regulations may apply.
- All overseas visits (Category 4) require Local Authority Approval as well as School/In-House Approval. Because of the additional complexity and financial commitment involved, those who are planning overseas visits should seek initial or outline approval for the visit at an early stage from all relevant authorities before firm financial commitments have been made.
- In particular, Visit Organisers who are planning overseas expeditions must contact the Local Authority as early as possible, before commitments are made as the Local Authority may wish to make specific requirements clear to the school/establishment or provider.
- For further information, see the Outdoor Education Adviser Panel national guidance via the follow webpage: <https://www.oeapng.info>

11.2 Using a tour operator or travel agent (see also 11.23 Provider- led study/sports tours)

- If using a travel agent or tour operator the Visit Organiser should ensure that it is a reputable and experienced company. Even if a tour operator is used, Visit Organisers are still responsible for carrying out their own research and risk assessments when planning the visit.
- Many commercial tour operators specialise in visits for groups and will organise travel, hotels, visits and all other necessary details. Such operators have responsibilities under the EU Package Travel, Package Holidays and Package Tours Regulations 1992 which requires fair and guaranteed conditions and protection of pre-payments. Firms who are members of the Association of British Travel Agents (ABTA) or the Association of Independent Tour Operators (AITO) have signed up to a code of conduct and provide financial guarantees.
- When travelling abroad and using a travel agent, the Visit Organiser must check that the operator or agent offers financial protection for the refund of payments and the costs of repatriation in the event of insolvency.
- For air travel, Visit Organisers should normally book with an operator who holds an Air Travel Organisers Licence or ATOL. This licence provides security against a licence holder going out of business. ATOL financially protects all flights and air packages sold by UK tour operators. Money will be refunded if the tour company stops trading. In the event of this occurring whilst a group is still abroad, the group will be returned at no extra cost. All ATOL tour operators can be checked out at www.atol.org.uk or by telephoning 0207 4536430.
- Agents who are not bonded by ABTA or ATOL must have insurance against insolvency. Alternatively, they must place all monies they have received for a visit in a separate trust account under a trustee's control.
- Group leaders may wish to check whether foreign operators based abroad are members of trade associations offering assurances similar to those of ABTA. Details should be available from national tourist offices or embassies.
- All contracts must be made with the school/establishment and under no circumstances with parents/guardians.
- As part of the overall risk assessment process, and in keeping with their legal duty of care, the Visit Organiser must take reasonable steps to check that any travel company/tour operator provides a suitable, reliable, and safe service - for example, that the Tour Operator:
 - complies with package travel regulations
 - can offer financial security for bookings
 - provides activities and services in accordance with recognised safety standards
 - has checked the accommodation and transport for suitability and safety.
- Information and reasonable assurances can usually be found by checking:

11. Overseas Visits (including exchange visits and expeditions)

- the provider’s website for relevant information and assurances
- literature that has been provided by the organisation for visiting groups
- if the provider is a member of the School Travel Forum (STF)
- if the provider has a Learning Outside the Classroom (LOtC) Quality Badge. The LOtC Quality Badge is a nationally recognised accreditation scheme which aims to assist schools/establishments in identifying providers who deliver good quality teaching and learning experiences and manage risk effectively. Badge holders usually display the logo on their website and advertising literature. Further information about the LOtC Badge, and a complete list of all badge holders is available via the website www.lotcqualitybadge.org.uk. It is not usually necessary to ask for further assurances regarding safety standards if the provider has already been inspected and awarded an LOtC Badge, but nonetheless it might still be important to visit the venue or request other specific information as part of the visit planning process.
- emailing or writing to the manager of the organisation to request specific information and assurances.

11.3 Organising your own visit (see also 11.23 Provider- led study/sports tours)

- It is possible for a Visit Leader to book all the elements of an overseas visit individually and combine them into a self-arranged package. However, the responsibility for a self-arranged package lies with the establishment or their employer.
- Under The Package Travel, Package Holidays and Package Tours Regulations 1992, schools/establishments may themselves become organisers, where they contract directly with hotels and apartments for accommodation and with an airline, coach or ferry company for transport and/or with others for excursions. As an organiser, however, the school/establishment would have to provide sufficient guarantee for the refund of money paid over and for the repatriation of the consumer in the event of insolvency.
- Booking direct with an airline, including so-called “budget” airlines, will not normally provide ATOL protection. Visit Organisers should be aware that there may be little or no compensation if flights are postponed or cancelled, and parents/guardians should be informed accordingly.
- Group leaders organising their own visits should be aware of the EU Directive on Package Travel, Package Holidays and the Package Tours Regulations 1992, as mentioned above. These regulations impose obligations and liabilities on the “reorganiser” or “other party to the contract” in the case of package travel. Schools/establishments organising their own educational visits abroad should be able to justify why their visit is not within scope of these Regulations. A “package” is a combination of any two of: accommodation, transport and other tourist services. To be exempt from the Regulations, a package should not be a regular event. The regulations should not apply for visits that have a clear educational aim and are part of the curriculum of the young people. Schools/establishments should therefore clearly state the main educational aim(s) of the visit on their visit approval forms.
- The package travel regulations are quite complex and schools/establishments unsure of their situation should contact the Department of Trade and Industry or CBEVE. The DTI advise that school ski trips (which are voluntary activities undertaken by some young people) fall within the regulations unless they are organised only occasionally. Schools/establishments are therefore advised generally to organise ski visits through bonded tour operators. For schools/establishments making their own arrangements, trust accounts under the control of a trustee may be the only realistic option.

11.4 Planning overseas visits

- It is important to start planning overseas visits in good time, especially as they usually require a lot of preparation and considerable expense. For these reasons it is common practice to start preparations and conduct the necessary research many months in advance.
- Separation from familiar language, culture, customs and law heighten the need for careful planning, preparation and contingency arrangement so it is essential that all members of

11. Overseas Visits (including exchange visits and expeditions) a group know clearly what to expect and what is required of them. Group members, supervising staff, and parents must be thoroughly briefed and have the opportunity to ask questions.

- It is good practice, wherever possible and financially viable, to make an exploratory visit to the overseas destination(s). If this is not reasonably practicable, then the Visit Organiser should gather sufficient appropriate information on the location, venues, and facilities and obtain assurances regarding the services they provide. The following sources can provide useful information and assurances:
 - the websites for the accommodation and activity providers
 - the Foreign and Commonwealth Office (www.fco.gov.uk)
 - other groups who have visited the area
 - the local schools in the area to be visited
 - national travel offices in the UK
 - embassies/consulates
 - travel agents/tour operators
 - websites, books, magazines

11.5 Risk assessment and travel advice

- Visit organisers should refer to the relevant generic risk assessments for their proposed visit. The Local Authority provides a number of generic risk assessments such as “Travel by Plane”, “Travel by Coach”, “Travel by Ferry”, “Overseas Visits”, “School Exchange Visits”.
- In order to complete the specific visit risk assessment, Visit Organisers are advised to refer to the particular advice provided by the Travel Advice Unit of the Foreign and Commonwealth Office (FCO) for the country(ies) they plan to visit (available at www.fco.gov.uk). This is particularly important when planning a visit to countries that are further afield, or that have experienced disasters, conflicts, terrorism, outbreaks of disease, or civil unrest in recent years. This site provides information about safety for tourists. The exact wording of the FCO guidance is usually the basis upon which insurance companies decide whether or not they will cover visits to such countries, including costs incurred by a cancellation. The FCO advice is updated as situations change so the website should be looked at regularly prior to departure.

11.6 Staffing and supervision issues

- It is not helpful to prescribe staffing ratios, as they will depend upon a wide range of factors. However, for overseas visits, a minimum ratio of 1 competent adult to 10 group members (with a minimum of 3 adults overall) is normally recommended.
- The total number of adults required should reflect not only the direct supervision needs, but also the contingency plans made for emergencies. It is not uncommon for a member of staff to need to return home early or to accompany a group member to hospital. Staff may even need to remain with a group member in an overseas hospital after the main group has returned home. There should be sufficient flexibility within the staffing arrangements to cater for all such scenarios.
- It is useful for at least one of the leaders to speak and read the relevant local language. If not, at least one leader should have enough knowledge of the language to make basic conversation and deal with an emergency, and/or the party should have a local guide who speaks good English as well as the local language. It is good practice for leaders who are not fluent in the local language to each carry a phrase book and/or a card with key phrases that might be useful in an emergency.
- It is advisable for young people to carry a note in the foreign language in case they get lost, including details of their accommodation address, telephone number and/or rendezvous point. There should be frequent headcounts, especially in crowded areas and before moving on from any venue. It is often useful to be able to identify group members readily, e.g. uniform, brightly coloured back-pack, cap or item of clothing, badges. However, no student should display their name clearly on their clothing.
- All staff should be properly trained in child protection/safeguarding, taking into account the additional risks involved in residential situations and being overseas. In order to avoid

11. Overseas Visits (including exchange visits and expeditions) situations that could lead to accusations of improper conduct, staff and adult helpers should be appropriately trained and briefed.

11.7 Briefing and preparing group members for overseas visits

- Group leaders should ensure that the party is aware of the legal position of issues relevant to the group - such as the age at which young people may consume alcohol. Parents/guardians should be informed of how such matters will be dealt with during the visit. Visit leaders might ask group members and their parents/guardians to agree to a behaviour code or set of agreed ground rules – this should include possible sanctions, including the circumstances in which it may be necessary to repatriate a member of the party, and how the cost of such action would be paid.
- All group members should be made aware of, and briefed regarding, the following:
 - Legal requirements – for example, crossing the road without using pedestrian crossing points or dropping litter are offences punishable by spot fines in some countries.
 - Language – for example, common phrases which may be helpful;
 - Culture – for example, what is considered appropriate behaviour or clothing;
 - Drugs, alcohol, cigarette usage (leaders should decide if they need to obtain parental consent for specific activities if they would be contrary to English law but not to that of the country being visited. For example, the age at which cigarettes may be purchased or alcohol consumed is different in some other countries than the UK.);
 - Food and drink – group members should be warned of the dangers of drinking tap water in certain countries. In some countries it is safer to drink bottled water, and care needs to be taken with raw vegetables, salads and unpeeled fruit, raw shellfish, underdone meat or fish;
 - Money – how to carry money and valuables securely and discreetly, e.g. money belts;
 - If and when they can use their mobile phones, and any codes needed for phoning home;
 - What to do if separated from the group, or in any emergency;
 - The hazards of crossing the road in a foreign country (it can be difficult to get used to traffic which travels on the right, and young people should be encouraged to use pedestrian crossings);
- Although mobile telephones can provide a vital link between group members and their parents/guardians, they can also create difficulties, especially if incorrect messages or inappropriate images are sent home or posted on social networking sites by group members. Visit Leaders should therefore establish a clear policy for the use of mobile telephones and social networking sites by group members during a visit.
- It is good practice to supply group members with some form of ID card that they carry with them at all times in case they become separated from the rest of the group. This need be no more than a laminated card, containing the following:
 - Name
 - Home Address
 - Medical allergies and requirements
 - Contact details of accommodation
 - Insurance details
 - Name of school/establishment party
 - Leader mobile phone number for emergency use
- To avoid Child Protection and confidentiality issues, it is recommended that ID cards are collected and destroyed after the trip.

11.8 Documentation

- All documentation (including travel documents) must be photocopied with a set for the Group Leader and another for the named UK emergency contact.
- It is the Overall Group Leader's responsibility to ensure that they carry all documentation that is necessary and have the following available for anyone who may require it:
 - list of all group members, together with their contact details;
 - copies of the key pages of all passports/visas/travel tickets;
 - parent/guardian/next of kin contact address and telephone numbers – home, work, holiday (including a back-up emergency contact for everyone);

11. Overseas Visits (including exchange visits and expeditions)

- parent/guardian consent forms and up to date medical details of all group members;
 - all travel tickets;
 - copy of contract/booking form;
 - destination address and telephone number;
 - insurance details and telephone number;
 - UK emergency contact details.
- Depending upon the age of the group members, it may be advisable for the leaders to hold their passports, visas, EHIC card, and pocket money centrally.

11.9 Passports

- Passports are needed for all overseas visits, including day trips, usually in the form of an individual passport. Group passports do not satisfy the requirements in all countries, so Visit Organisers should check beforehand.
- Visit Organisers should ensure that passports are in good condition and valid for at least 6 months from the date of return.
- Passport applications should be made early to allow plenty of time for any difficulties to be resolved. For more information about passports, go to the Passport Agency website. The party leader should take a photocopy of the information page of all passports, visas, and other important travel documents on the visit. However, these should be kept separate from the original documents. It is also recommended to give a second copy of all these documents to the emergency home contact. Always keep passports and other travel documents in a secure place while abroad (e.g. hotel safe). If a passport is lost, contact the local police and the British consulate who can issue emergency travel documents.
- Whilst a collective passport might be more convenient in some respects, group leaders should plan contingencies in case a group member has to return home early or has to remain overseas after the rest of the group has returned. In these circumstances, it might be difficult to make alternative passport arrangements. Individual passports provide greater flexibility in these circumstances, and therefore are preferred by many visit leaders. Collective passports can be issued by the Passport Agency to approved parties of young people travelling abroad. For full details of the scope and requirements for collective passports contact the Passport Agency as early as possible in the planning process for the visit as the process can be time-consuming. The Passport Agency can advise on which countries accept collective passports. Collective passports are valid for groups of 5 and 50 young people under the age of 18. The party leader and deputy leader must be over 21 and hold standard British passports. A deputy leader should be named as if for any reason the party leader named on the passport is unable to travel, the passport would be invalidated. Other accompanying visit leaders, adults and young people over the age of 18 must carry their own passports. Parental consent will need to be obtained for their child's inclusion on the collective passport. Only British Nationals may be included on a collective passport. If you are not sure of a child's citizenship contact the Passport Agency for advice as soon as possible. Children who are not eligible to travel on a collective passport must have their own individual passport obtained from their own national authority in the UK. They should also check visa and other special entry requirements for the countries to be visited. Group leaders should be aware of the different passport arrangements that may apply to some young people so that any difficulties may be resolved in good time. It is advisable to contact the Passport Agency as soon as a visit is being planned to check if a collective passport may be used and to obtain an application form and blank identity cards if required. Applications must be submitted at least 4 weeks before the passport is required, but it is advisable to allow much more time than this.

11.10 Visas

- There may be a requirement for a visa to enter particular countries. Visit Organisers should check visa requirements with the travel company, and contact the Consulate or Embassy of the country(ies) to be visited. They should also check the national citizenship status of all members of the party with care. If a party member is a British Dependent Territories Citizen, British National Overseas or a British protected Person, they may need

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions) a visa that is not required by British citizens. This may be relevant to countries through which the party passes in transit.

- Adults and children who hold a non-British passport normally require a visa to enter another EU state. However visa exemption may be available for such members of a group taking part in an educational visit.
- Details of visa exemption are available from the home office on Tel: 0208 760 8773. For entry to many countries outside the European Union a visa is required for all members of the party. Details of the procedure for visa applications are available from consular sections of the embassies of the countries to be visited. The Foreign and Commonwealth Office website provides further information for individual countries.
- Visa regulations are subject to change without warning and leaders are advised to obtain precise information from the appropriate embassies early in the planning process and to check again prior to departure.
- In order to obtain a visa, applicants must produce a valid national passport.
- A visa application form should be obtained well in advance as this will give details on what must be provided.

11.11 Customs and security/terrorism issues

- Customs regulations vary depending upon whether schools/establishments are travelling within or outside the EU. Full details about customs regulations may be obtained from HM Customs and Excise (Tel: 0845 0109000 or www.hmce.gov.uk), or at UK ports and airports.
- Group leaders should be aware of prohibitions on importing certain items available abroad e.g. flick knives, ammunition or fireworks. Young people and parents should be clearly informed, and made aware that if such items are found, they could be liable to prosecution. These offences are taken very seriously and can result in more than confiscation, especially if such items are hidden.
- All group members must be clearly briefed in advance regarding items (e.g. batteries, sharp objects, knives, liquids etc.) that are not permitted on board planes, or in their hand luggage, whilst travelling.
- If these items are found, it is at best very disruptive for everyone if luggage has to be repacked - at worst, it could lead to the group missing a flight, or perhaps even prosecution.
- Similarly, group members must be briefed not to be frivolous about terrorist issues, or to joke about having bombs etc. Issues said even in jest may have serious consequences!

11.12 Health issues

- Visit organisers should visit the Department of Health's website, [Health Advice for Travellers](#) for information. Leaders must make themselves familiar with any health risks in the country visited and ensure that members of the party have any vaccinations that may be needed.
- Check if proof of vaccination is required. Information should be obtained on diseases common in the country (such as malaria, rabies, HIV/AIDS, hepatitis A, giardia, amoebic dysentery and travellers' diarrhoea) and how to avoid them.
- Guidance must be obtained and followed on personal hygiene, types of food and on water supplies that may be a source of infection, and protection from the sun.
- Leaders should obtain information (available for most EC countries on the above website) about the medical services available in the countries which are being visited.
- Significant health hazards should be included in the specific visit risk assessment, and group members must be briefed on the hazards and how to avoid them. Particular advice may need to be given regarding risks associated with drinking tap water or eating certain foods (raw vegetables and unpeeled fruit, shellfish and undercooked meat etc.), exposure to the sun, insect bites and rabies.
- Group members should be aware of the risk of rabies when overseas, and they should be advised not to touch any animal, even if apparently 'tame'. In the case of anyone receiving a bite or scratch from any animal outside the UK immediate local treatment is of paramount importance. Wash the wound with soap or detergent and water, then flush

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions) with water alone; apply alcohol if possible. Get medical attention quickly as a course of vaccinations may need to be started immediately. If an incident occurs, contact the nearest British Consular official and inform the local police, and record the date and place of incident, the animal's description and whether it was wild, stray or in the charge of its owner. If the animal can be kept under observation for two weeks, arrange to keep in contact to see if the animal becomes sick or dies. Ensure the victim consults his/her doctor immediately on return to the UK.

- There may be difficulties in taking prescribed medication into and out of some countries. Advice may be obtained from the relevant embassy but the majority of cases can be resolved by ensuring that the medication is carried in the proper named prescription bottle/pack.

11.13 EU Reciprocal Medical Treatment - the European Health Insurance Card (EHIC)

- Entitlement to free or reduced cost-emergency medical treatment in most European Union (EU) countries (and Switzerland) is dependent upon having a European Health Insurance Card (EHIC) for each member of the party. The European Health Insurance Card (EHIC) is not valid outside the EU and Switzerland – refer to the NHS and FCO websites for up-to-date information.
- Only state provided treatment is covered, and group members are entitled to receive treatment on the same terms as 'insured' residents of the country you are visiting. Private treatment is generally not covered, and state provided treatment may not cover all of the things that you would normally expect to receive free of charge from the NHS.
- Each of the EU countries and Switzerland has their own rules for state medical provision. In some, treatment is free. In some, you have to pay part of the cost. In others, you have to pay the full cost and then claim a full or partial refund.
- A separate European Health Insurance Card (EHIC) is required by every traveller. Visit organisers should check that all group members have current and valid EHIC cards.
- Group leaders should obtain the leaflet 'Health Advice for Travellers' from a post office, which gives advice on the use of EHIC cards and includes an application form. The completed application forms and EHIC cards should be handed to the counter at the post office who will stamp and sign the EHIC cards to validate them. EHIC cards should be carried with passports when travelling in the EU. Always keep a photocopy of your European Health Insurance Card (EHIC) with the original. This is important in some countries, as a photocopy may be required as well as your original EHIC card.
- Refunds can be claimed by applying, either in person or by post, to the relevant authority in the country you are visiting, while you are there. You must enclose the original document, therefore keep photocopies for your records. Claims can be made later once back in the UK but the process may take a long time.
- A European Health Insurance Card (EHIC) does not cover services such as mountain rescue, or repatriation costs. Leaders must ensure that relevant needs are fully covered under the group's travel insurance policy. As travel insurance covers some things that European Health Insurance Card (EHIC) does not cover (and vice versa), it is important to have both.

11.14 Insurance

- Appropriate insurance for medical and other emergency expenses arising from accidents or illness is a requirement for all overseas visits, including those to EU countries. This can usually be arranged via the Local Authority or through the tour company with whom travel is arranged.
- The Overall Group Leader must ensure that the party is covered by comprehensive insurance that covers all travel and all planned activities. Insurance policies must be read and checked carefully to ensure that the cover is sufficient.
- Medical insurance should be taken out even if an EHIC card is carried. The cost of medical services abroad may be very high and the European Health Insurance Card (EHIC) will not necessarily cover all costs. However, the EHIC card can save money by covering the excess on travel insurance claims.

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions)

- In some places, medical bills must be settled immediately by cash or credit card, and must be reclaimed later from the insurer. It is important for leaders to keep all documentation, including any receipts. Advice from the tour operator or other appropriate source should be sought.
- Cover should include provision for repatriation, the additional costs of a leader staying on or travelling home with an ill or injured young person, and parents/guardians travelling from home to be with their child, if necessary.
- Check that rescue expenses are covered. In remote regions, air ambulances or helicopter rescues can be extremely expensive.
- Visit organisers are advised to provide details of the insurance cover to parents/guardians so that they are fully informed beforehand and can give their consent to arrangements.

11.15 Emergency procedures

- Both the school/establishment and any third party provider should have an emergency or critical incident plan, and visit organisers should check that their plans are compatible.
- The plan should outline actions to be taken in case of emergencies, and should include the following:
 - 24/7 emergency home contacts established back at the establishment, including overnight, holiday periods and at weekends
 - Whole group evacuation/repatriation
 - Contingency funding arrangements
 - Getting support out to the group
- Leaders should discuss beforehand with the group what actions might be taken if there is a problem. Group leader and supervisors should know where the nearest British Embassy or Consulate is located and all relevant telephone numbers (depending on the age of the young people, it may be appropriate to ensure that they have this information to hand).
- In the case of a medical emergency in an EU country, full use should be made of European Health Insurance Card (EHIC) reciprocal health insurance arrangements, but these may still require payment to be made for medical treatment, with all or part of the cost being reclaimed subsequently. A cash float (in foreign currency) or a credit card should be available for this purpose.
- When medical treatment is given abroad, while emergency treatment must be given immediately, the insurers should be contacted as soon as possible before incurring substantial expenses and before arranging any repatriation.
- It is essential that duplicate copies of all doctors' letters, ambulance certificates, bills (e.g. for medicines), vouchers, hospital admission forms, blood transfusion certificates, etc, are kept for the UK insurers.
- Visit leaders should refer to the LA guidance (see chapter 14) on critical incident/emergency planning for details of how they should respond to a serious emergency and how to initiate support from their employer.

Guidance for specific types of Overseas Visits

11.16 Exchange Visits abroad

- Exchange visits are of mutual benefit to young people and staff on both educational and personal levels and usually operate within a relationship between two institutions in which mutual trust and respect play an important part. Accommodation for young people and staff is usually arranged on a reciprocal basis with the partner school/establishment, often in the homes of the young people or visit leaders.
- For exchange visits to be safe and successful, it is vital that there is close liaison throughout between the schools/establishments involved. The initial task for an exchange is to communicate clearly to the partner school/establishment the purpose of the visit. If the aims of your group are not the same as those of the group from abroad, this need not present a problem as long as the situation has been made clear before the exchange takes place.
- Exchange visits can help young people to develop self-esteem, self-confidence and independence, while developing their knowledge base and broadening their horizons. Staying with a host family gives young people both an insight into the culture and a first-hand opportunity to use their language skills in a real context.
- Such visits can present unparalleled opportunities for cultural understanding and development with young people. However the context in which they occur is far removed from most other educational visits and requires special attention, especially as:
 - most of the visit takes place outside the jurisdiction of English law, guidelines, and familiar procedures.
 - most of the visit will take place with host families taking the primary care responsibility for young people, and not under the direct supervision of the Group Leader or other accompanying adults.
- However, the legal duty of care and responsibility for health, safety and welfare remains with the designated Visit Leader(s). Exchanges therefore require thorough and carefully planned risk management that addresses the issues relating to indirect supervision and special issues relating to child protection. All parties involved must fully understand the implications of this.
- Most of the principles required for other types of educational visit apply, but parents/guardians must be given full and frank information about the different risks that arise from young people staying with families not subject to the same vetting processes as in the UK, or procedures against which a commercial provider may be measured.
- Where an exchange visit is arranged for the first time, or involves a significant number of new staff, a preliminary visit is strongly recommended. This can provide an opportunity to consider a specific risk-benefit assessment at first hand. Face-to-face dialogue between exchange partners should ensure commonality of aims, objectives and activities. Any agreement should include a commitment to the health, safety and welfare of the young people involved. Visit Leaders may wish to establish clear policies for use of the internet and for participating in activities organised by their hosts during their stay, as these are outside their normal control.
- The Local Authority's generic risk assessment on "Overseas Exchange/Homestay Visits" highlights the most commonly identified hazards, and suggests suitable control measures for minimizing risks.
- Further guidance on exchange visits, provided via the Outdoor Education Advisers Panel, national guidance which can be accessed via: <https://www.oeapng.info>
- The charity Child-Safe produces a series of Travel Safe publications include advice for host families, schools, the voluntary sector, parents and guardians, children and young people. These are available from the website www.child-safe.org.uk.

11.17 Exchange Visits - Vetting suitability of host families (see appendix VGA 11.1)

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions)

- The Vetting and Barring regulation proposals do not apply to UK-based exchange visits of fewer than 28 days, but overseas parents should be given the opportunity to indicate that they consent to the suitability of the selection process that places their child with the volunteer host family. As long as they work only with their own group, overseas leaders bringing groups of young people to the UK for activities and cultural tours have a three-month exemption from the requirement to register the work they do with the young people.
- Although there is no legal requirement to do so, schools/establishments in the UK may still wish to carry out DBS checks on the adult(s) within the UK-based families that are hosting young people from overseas. However, visit organisers and the parents/guardians of exchange students should be reminded that a DBS check (or any other vetting procedure) is no guarantee as to the suitability of an adult to work with a group of young or vulnerable people. The placement of an adult within a situation of professional trust (where young people could be vulnerable to physical or mental exploitation or grooming) should always be based on a common sense risk-benefit assessment.
- Visit Leaders should ensure that those in a position of parental authority understand that an equivalent to DBS checks is unlikely to be available in countries visited by young people from the UK. It is therefore critical that Visit Leaders ensure that the overseas host school/establishment, or agency, has an appropriate vetting procedure in place to assess the suitability of home placements. If the host school/establishment or placing agency does not have appropriate measures in place for carrying out checks to ensure the health, safety and welfare of exchange or home stay pupils, the Visit Leader should seek further assurances and/or reconsider whether the visit should take place.
- The vetting of host families should include:
 - criminal record checks where required;
 - verification of family structure;
 - ensuring a Code of Conduct has been agreed;
 - checking that house rules are as agreed;
 - home visit checks;
 - ensuring that appropriate information is shared;
 - checking the suitability and privacy of sleeping and toilet arrangements;
 - ensuring that family activities fall within the scope of parental consent;
 - transportation (including drivers) is suitable and covered by parental consent.
- Leaders organising exchanges need to find out about the relevant procedures in the foreign country for vetting the suitability of host families, including the availability, or not, of criminal checks. Most European countries have an established vetting procedure in place, but there may be differences from the British system.
- Exchange or home stay visits may be arranged through agencies, in which case the agency should operate an appropriate system for vetting the host families. If the available checks appear inadequate, the visit leader should seek further assurances and/or consider whether accommodation should be arranged in another venue. Parents must be made aware and give their consent to the level of checks available.
- The Visit Organisers should carry out appropriate checks beforehand to check the suitability of the home environment (e.g. if the guest will have access to a private bathroom), and that domestic living arrangements give adequate privacy and security to guests (e.g. will the guest need to share a bedroom)
- If young people are accompanied by a colleague from their own school/establishment, it may address some concerns regarding safety and homesickness, but the educational value of the experience might be diluted as a result.
- Appendix VGA 11.1 has a “Host family stay information form” that can be used to check on the circumstances of each household and to assess if homes are suitable. These forms have been translated into other languages (German, French, Spanish) – see VGA 11.1G, VGA 11.1F, and VGA 11.1S)

11.18 Exchange Visits - Visit Organisers should seek to ensure the following:

- good personal knowledge and communications with the host school/establishment or organisation, and counterpart;

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions)

- satisfactory vetting and pairing/matching arrangements with reference to age, gender and any special, medical or dietary needs;
- hosts are aware of specific expectations/requirements, especially of any special, diet or medical needs of their guests;
- appropriate sleeping and washing/toiletry arrangements, with adequate privacy;
- parents/guardians are specifically aware that their children will not always be under the direct supervision of the Group Leader or accompanying adults (N.B. young people on exchange visits may be particularly vulnerable to road accidents);
- parents, young people and the host school/establishment are clear about arrangements for collecting and distributing young people to families and transport arrangements throughout the visit;
- regular checks are made with young people/families to resolve any problems at an early stage;
- young people are briefed about personal safety, and are issued with appropriate written guidance;
- young people and parents are specifically briefed on the ground rules agreed between the Group Leader and the host family for domestic living, any activities and communication/contact arrangements with the Group Leader or other supervising adults;
- young people should have ready (24hr) access to their Group Leader, usually by phone, throughout the stay. Mobile phones may be useful for keeping in contact each day or for alerting leaders to any serious issues or concerns;
- regular contact must be kept with all young people and their welfare monitored throughout the visit. This should initially be maintained daily and recorded on a daily register/log;
- emergency arrangements are in place in the event of illness or injury to a young person or domestic crisis within or with the host family;
- contingency arrangements are in place to move a young person to a different host family if necessary;
- all concerned are clear about the transport provision from and to the UK and distribution arrangements to host families;
- consideration has been given to the safety and well-being of the young people during travel arrangements made by the host family – for example the suitability of the drivers and vehicles involved;
- establish if any adventurous, hazardous, or unusual activities are likely to be planned for their visitors by the host family, and insist that these are known beforehand, vetted and approved. If such activities are planned, parental consent is required in advance;
- insurance cover for the visit must take into account the full range of activities that the group members will take part in during the visit, including those organised by the host families.
- explain what you consider to be normal arrangements for supervision, down time, bed times etc;
- agreed phrases or code words within a telephone message that mean “I need to talk with you privately” or “I want you to come and visit me straightaway”;

11.19 Planning the programme of exchange visits

- Visiting young people may be invited to attend normal lessons with their partners, although unless the young people have a good knowledge of the foreign language, or lessons are specially planned, prolonged attendance may be tedious.
- Agreement should be reached concerning the suitability, safety and cost of any planned activities and excursions.
- The Visit Organiser should ensure that the costs of activities and excursions are calculated carefully, and allowed for in the payment requested from parents/guardians.
- Any exchange visit that includes work experience should be considered in the context of the employer’s own work experience policy. Where this does not cover work experience abroad, special arrangements may need to be made, in which case, organisers are recommended to contact the employer at the earliest possible stage of planning.

11.20 Provider- led Study and Sports tours

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions)

- Tour operators take groups of young people almost anywhere in the world for a wide range of educational purposes. They offer packages building travel arrangements, accommodation and learning content into a co-ordinated programme that removes much of the organisational work from party leaders. Almost any type of content is possible – including cultural visits, community work, historical and language studies, sports tournaments and ski courses.
- Tours are a particularly strong way to consolidate learning, as the young person's experiences can be directly related to the real world. It is a way to ensure that geographical studies come to life (with the actual physical feature close at hand) and a foreign language may be easier to assimilate and use in its native environment. Many tours will also lend themselves to cross-curricular study. In addition to specific, targeted outcomes, the richness and diversity of experiences is such that participants will inevitably benefit from other learning opportunities at the same time.
- While brochures and web sites will detail tour operators' most popular tours, some operators will tailor-make a specific itinerary to meet the Visit Leader's specific requirements in terms of aims, objectives and learning outcomes. However, Visit Leaders should seek robust assurances that the provider does provide to the standard that they claim. The Learning Outside the Classroom (LOtC) Quality Badge scheme makes this task much easier, and there is normally no need to seek further assurances where the provider holds the Badge.
- It is essential to find a provider that will best meet the learning objectives. Ensure that there is consideration of the full range of services required, including accommodation, transport, learning support and the component parts making up the whole package, such as concerts, fixtures and specified activity sessions:
- General Tour Operators & Travel Agencies - Tour operators and travel agencies which normally make arrangements for the public through third parties may also have the facility to combine some or all of these services for school groups and other parties of young people.
- Specialist Tour Operators - These are organisations that specifically deal with the needs of the educational sector, and the range of provision is wide and varied. Individual companies may concentrate on a specific topic, such as battlefield tours or hockey tournaments; on specific destinations such as the Isle of Wight or Eastern Europe; or a comprehensive programme of tours covering a range of options.
- Coach Operators - Many coach operators will offer to organise tours for school/establishments, particularly if they already provide transport arrangements for other purposes. Visit Leaders should ensure the tour operator has the experience and expertise for the tour they require.
- Self-Arranged Packages - It is possible for a Visit Leader to create a tour by booking all the elements individually and combining them into a self-arranged package. However, a tour operator is legally responsible for the package they put together – the responsibility for a self-arranged package lies with the establishment or their employer.
- Quality Standards - The LOtC Quality Badge encourages providers to have their safety and quality standards verified by independent, inspection regimes. The badge provides a quick and easy means for party leaders to ascertain that a provider has been inspected and accredited to a level that meets all the usual assurance requirements of a well-informed and competent party leader. Where the provider holds a LOtC Quality Badge, no further assurances are normally necessary, but Visit Organisers can still ask for any additional information and assurances that they feel is necessary.
- Outside the LOtC Quality Badge scheme, the travel industry is covered by a number of legal requirements offering consumer protection, including the Package Travel Regulations (1992). These apply to anyone who offers for sale (other than occasionally) package holidays. An important safeguard in these regulations is the requirement for financial security, which must be provided by a bond, insurance or trust fund. Bonds are often established through national trade associations, such as ABTA. If the package includes air travel, there is an additional requirement that the organiser must hold an Air Tour Operator's Licence (ATOL). Self-arranged tours do not generally benefit from this kind of consumer protection.

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions)

- Visit Leaders should ensure that both they and the provider have full understanding of who is responsible for particular aspects of the tour. In particular, a coach driver is responsible for the vehicle and safe driving, whilst the Visit Leader is responsible for supervision and group safety.
- Where a Tour includes any adventurous activity (e.g. skiing, rafting), then specific guidance about such activities should be followed. Clarification should also be sought about whether these are an integral part of the tour package, so under the control of the tour operator, or a bolt-on extra where the tour operator simply passes the group on to an activity provider (so the responsibility of the party leader).
- Visit leaders proposing to lead adventure activities abroad must be trained and qualified, and have appropriate site, in-country and/or environment specific experience. Leaders with qualifications should take advice from the LA Educational Visits Officer and/or the governing body of the relevant sport as to the validity or relevance of their qualification in a foreign country, where laws governing leadership and supervision of adventure activities may differ considerably from those in the UK. For groups operating in mountainous environments abroad, note that high Alpine-style mountains are generally outside the scope of normal UK Mountain Leader qualifications, and fall more within the realms of Mountain Guides or European Mountain Leaders.

11.21 Overseas expeditions

- An expedition in the context of this guidance is one taking place outside of the UK (in Europe or further afield) and involving a deliberate element of risk, challenge or adventure that requires specialist skills for its safe management. They take place in environments that include mountains, deserts, jungle, forests, rivers and sea. The elements of risk and adventure (either real or perceived) provide an opportunity for individuals to challenge themselves to achieve set objectives while working as part of a team. They provide opportunities to travel to countries with very different environments to the UK and where the young people meet people from different cultures. Some expeditions of this type can be accredited through schemes such as a Duke of Edinburgh's Award and John Muir Award, or cover academic subject areas such as geography, history, languages, science and the arts.
- Expeditions of this type are often planned over a 12-24 month lead-in period, providing the participants with many opportunities to plan, fund raise, research and get fit over an extended period of time, as well as reviewing the expedition outcomes on their return. They provide opportunities for very powerful and lifelong learning.
- Overseas expeditions may present significant additional hazards and organisational challenges not normally encountered in the UK or Europe. They can extend for several weeks in duration and require detailed planning, with mature and competent leadership.
- Schools/establishments planning overseas expeditions must therefore contact the LA Educational Visits Officer as early as possible, and before commitments by the school/establishment or parents are made. The LA Educational Visits Officer will provide advice and support to the Visit Organisers and will help to ensure that expedition providers operate to recognised standards.
- Expeditions can be organised entirely by establishment staff but most use a provider. Expedition providers usually offer specialist assistance in the areas set out below:
 - Choosing a suitable destination
 - In-country support and awareness of local laws, conditions and customs
 - Planning a programme
 - Rescue, medical care and repatriation
 - Providing a suitably experienced and competent Expedition Leader
 - Risk management
 - Insurance
 - Presentations to participants and parents
 - Pre-expedition training for all leaders and participants
 - Flights
 - In-country transport
 - Accommodation and venues
 - Supervision of "programmed" and any "remote supervision" time

11. Overseas Visits (including exchange visits and expeditions)

- There are no statutory standards regulating expeditions overseas. Adventure Activities Licensing only applies to programmes in the UK. However, to prepare participants for a challenging expedition, some prior training is often required and elements of this UK-based training may be subject to Licensing under the Adventure Activities Licensing Regulations (1996).
- The non-statutory Council for Learning Outside the Classroom (LOtC) Quality Badge for Overseas Expeditions gives an assurance for both safety and quality of provision. There is also a British Standard BS8848 against which an expedition provision can be benchmarked, either by the client or by the provider.

Overseas Expeditions - Contracts & Legal Issues

- Establishment staff accompanying the expedition should ensure that they fully understand their role before any contracts are signed. Regardless of any terms or conditions, it is the establishment staff who will retain the overarching duty of care for the young people. Establishment staff should attend the expedition as employees of the local authority or academy/establishment. They should not sign a separate contract with the provider.
- The contract establishing the booking should be written and should be between the establishment and the provider. The establishment should ensure that they retain financial control of the contract by collecting monies due, and all payments must follow school/establishment accounting procedures.
- Where parents make any direct payments to the provider, there should be a separate written statement or 'Memorandum of Understanding' between the provider and the establishment that ensures the establishment retains control of the venture.
- Contractual arrangements should ensure that where a provider revokes on a significant aspect of the contractual arrangements – as where the provider is unable to supply an Expedition Leader with the previously agreed level of competence (and it is not possible to resolve the matter to the satisfaction of the establishment) then the establishment should have the right to cancel the venture and for all monies paid to be refunded. However, this should be without prejudice to any reasonable payment due to the provider for work carried out up until cancellation. The provider's right to initiate a cancellation should be 'fair and reasonable'.
- The establishment should ensure that the provider's financial systems protect all aspects of the expedition's finances, including any training weekends that are part of the preparation package. This should include ATOL bonding for all monies and include a statement that they comply with the Package Travel, Package Holidays and Package Tours Regulations (1992).

Overseas Expeditions – Staffing Ratios, Competence, Training and Preparation

- Staffing numbers and ratios should be based on risk-benefit assessments, taking into account all reasonably foreseeable variables, including the particular environment, the route, anticipated weather conditions, the nature of the activity/expedition, leader competence and nature of the group. Such assessment should include the need to meet the requirements of working within the establishment's guidance, as well as implementing the planned emergency procedures.
- Most expeditions will require an Expedition Leader (normally provided by the Expedition Provider) and a Visit Leader (from the school/establishment), and each may require one or more Assistant Leaders depending on the size of the expedition and the complexities of the programme. This must be risk managed carefully.
- The gender balance amongst the staff should reflect the make-up of the group. Consideration should be given to the possibility that a staff member may need to accompany a group member to hospital (or even return home with them), and they may be separated from the rest of the group for much of the expedition. This might have implications for the staffing of the expedition, and there should be sufficient leeway and flexibility to allow for this, without compromising the safety and welfare of all group members. Particular consideration should also be given to the possibility that a mixed gender group might be left with just male staff members (for example, if a female leader

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions) has to accompany a group member to hospital), and suitable contingencies should be discussed and agreed in advance with all group members and with parents/guardians.
- The Visit Leaders from the school/establishment should have substantial and appropriate leadership experience, preferably in similar environments. In situations where this is not the case, it might be possible to provide additional training.
 - It is critical that the establishment Head / Manager and the EVC give proper consideration to the issues regarding the competence of the establishment staff appointed as Visit Leader or Assistant Leader. The complexity of the various issues surrounding overseas expeditions is such that specialist knowledge is required to make the necessary judgements and the LA Educational Visits Officer be consulted at an early stage before any contracts are signed.
 - Special considerations of establishment staff competence should include an appropriate first aid qualification – this should reflect the type and remoteness of the expedition environment, and the number of others with expertise within the party.
 - Many Providers will offer training opportunities for Visit Leaders in aspects such as first aid, water safety management, roles and responsibilities and courses such as Mountain Leader Training.
 - It is also recommended that the Visit Organiser attends an “Overseas Visits Planning and Leadership” course (organised by the LA) or the one-day “RGS Overseas Expeditions and Fieldwork Course”. The course is organised by the Royal Geographical Society, endorsed by the Outdoor Education Advisers’ Panel and is held at venues across the UK. The main elements of the programme are set out below:
 - Setting educational objectives for your expedition
 - Initial research: where to go for information, advice and inspiration
 - Competence, leadership and supervision
 - Expedition planning and administration
 - Risk assessment and safety management
 - Good practice guidelines
 - Contingency and emergency planning
 - Training and medical preparations
 - Evaluation and reports
 - Establishment staff should receive appropriate expedition-specific training put in place by the provider. The EVC and establishment management team should give special consideration to the implications that would arise in the event that the designated Visit Leader is unable to participate in the expedition (e.g. through illness, injury, or job change). The establishment contingency planning must take account of this eventuality, and appoint a suitable deputy.
 - The provider should be consulted regarding their expectations of establishment staff and group fitness levels.
 - It is critical that responsibilities for both technical and pastoral aspects of the expedition leadership are fully understood by all concerned. Responsibility for the technical competence to plan, lead and manage activities undertaken in an active, on-going risk management context should rest with the provider’s Expedition Leader.
 - The competence of the Expedition Leader should be regarded as the single most important factor in ensuring a safe and successful expedition. To fulfil the role, the Expedition Leader must have the level of experience and technical competence to carry out their responsibilities. However, technical competence must be complemented by the experience of making active judgements and risk assessments in realistic contexts that ensure understanding of the environment in which the expedition takes place. Local knowledge, or experience of working in an environment that is similar to the one in which the expedition will take place, is critical. The Expedition Leader should hold (as a minimum) a 16-hour (assessed) First Aid Award. Where appropriate, the Expedition Leader must also have competency in “remote” first aid and knowledge of first aid relevant to the specific environment to be visited e.g. desert, jungle, at altitude.
 - Responsibility for the pastoral competence to manage the care, welfare and developmental experiences of the young people should rest with the establishment’s Visit Leader and their establishment staff team. The specific requirements will vary according to the nature of the group and take account of factors such as age, gender, experience

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions) and needs of the group. It must meet all necessary requirements as set out in their employer's guidance.

- The Visit Leader (from the school/establishment) will rarely be a specialist in the area of overseas expeditions. It will usually be the case that they will not possess the expertise necessary to assess the competence of the provider's designated Expedition Leader. However, the Visit Leader should ensure that they have an understanding of the principles that underpin the basis upon which providers appoint Expedition Leaders and should discuss this with their employer's appointed adviser to clarify their understanding. A provider should be able to assure the Visit Leader that their Expedition Leaders are required to demonstrate evidence of technical competence through an assessment or judgement made by a technical adviser – a person with the credible status, qualifications and experience to make that judgement. Where the provider holds a LOtC Quality Badge, this can reasonably be regarded as the assurance necessary to confirm that Expedition Leaders are appointed on a proper basis as explained above.
- With the exception of technical decisions relating to the safety and welfare of the group, the establishment Visit Leader should have the final say for decision making. Consequently, the pastoral Visit Leader may ask for an activity to stop, or request a rest or an alternative where their greater knowledge of the group leads them to such a decision. The technical Expedition Leader may ask or challenge the reasons for such a request, but should not override any such decisions unless there is a clear health and safety reason for doing so. Alternatively, the technical Expedition Leader may decide that for technical reasons the group is not able to proceed with the previously agreed plan, in which case the (pastoral) Visit Leader may ask for and challenge the reasons for such a call, but should not override the decision where it is based on technical factors.
- Should a leader have both technical and pastoral competence, they need to be very clear about their responsibilities and be aware that dual competence does not justify a reduction in ratios.
- The provider's Expedition Leader will need to know the group members they are expected to lead. They will require sufficient time in training to enable them to:
 - become personally acquainted with the young people and their leaders to decide if they can work together;
 - make a proper assessment of individual, group, and assistant leader competencies;
 - reconfirm aims and expectations.
- It is recommended that the Expedition Leader should be appointed to the group well before the expedition takes place - not less than 4 months and ideally 6 months prior to the expedition would be reasonable expectations. It is important that the Expedition Leader has the opportunity to work with the group and begin the training programme soon after their appointment.
- There should be adequate time in preparation and training for the Expedition Leader to become acquainted with all the group members, and for everyone involved to decide if they can work effectively together, and make a proper assessment of each other's competencies.

Overseas Expeditions - Local Guides, Porters, Muleteers, Cooks and Drivers.

- The ultimate responsibility for the selection and use of guides rests with the provider's Expedition Leader, even though the young people and establishment's Visit Leader may be involved in the process.
- Where the use of guides is a factor determining leader competence – particularly where the guides are going to be relied upon to supply local knowledge - then the following questions should be answered:
 - Where is the evidence of current good practice/competency of the guides to be used?
 - Do guides work under the control of a recognised company or are they an individual guide?
 - Have the guides been used before and to what effect?
- Where there is no recognised guiding system, evidence that can justify the appointment should be collected.
- Those wishing to appoint guides should also consider the following.

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions)

- Guides are normally employed for specific route-finding and technical knowledge. If appropriate, guides may have a supporting pastoral role, but not sole pastoral responsibility.
- Whilst a guide can complement the Expedition Leader, they must not replace the Expedition Leader.
- Where sound evidence of guiding competence cannot be obtained, the Expedition Leader should have sufficient experience and local knowledge to manage without a guide. This must be considered before routes are agreed.
- Where credible evidence of the guide's history / character is not available, then the guide must not have unsupervised contact with the young people.
- Where an additional risk-benefit assessment is required to manage changing circumstances - such a weather, fitness, injury, local conditions - the Expedition Leader must be satisfied that the guide and local information are of sufficient quality for the expedition to proceed with the preferred expedition plan, or the Expedition Leader must use the contingency plan alternative.
- Where the length of the expedition requires porters to support the carrying of equipment, the Expedition Leader must ensure that sufficient numbers are available.
- The Expedition Provider should have a policy for the welfare of all porters and pack animals.
- The experience and fitness of the young people, as well as the demands of the terrain, environment and weather, should determine the weight of the pack or load that young people carry.

Overseas Expeditions - Information to Parents & Parental Consent

- When planning to visit less developed countries, all group members (and parents/guardians) need to be aware that standards of accommodation, health services, vehicles, roads and other services may not meet those expected in the UK. Schools/establishments must assess the risks associated with these issues and ensure parents are properly informed and their consent given.
- It is critical that those in a position of parental authority have a clear understanding of all the implications of consenting to the young person for whom they are responsible participating in the expedition. Prior to being invited to make a commitment to the venture, they should be invited to a meeting hosted by the establishment and attended by the provider. The information given to parents should be agreed between the establishment and the provider before the meeting takes place and should be clear and detailed. Parental consent must be based on a full understanding of the expedition characteristics and programme. Information should include:
 - ALL planned or possible activities, including any contingency activities (i.e. Plan B)
 - Rest & relaxation period arrangements
 - Supervision arrangements
 - Codes of practice
 - Communication systems during all stages of the expedition
 - The pace and level of intensity of the expedition
 - Injury, illness, incident, emergency and evacuation procedures
 - Insurance arrangements
 - Transport
 - Accommodation
 - Disciplinary sanctions that are in place and who is liable for repatriation in this situation
 - Likely additional costs to participants e.g. clothing, inoculations, visas, spending money etc.
 - Parents should be made aware that whilst every step will be taken to ensure the safety of the participants, such activities are by their very nature potentially hazardous. It is important to identify the risks and have them acknowledged by parents on a fully informed basis.

Overseas Expeditions - Preparation and Training of Group Members

- A training and induction programme should be included in the plan (e.g. hill walking and carrying packs). This should cover all participants (including staff) and be monitored jointly between the provider and the Visit Leader. The training and induction programme should identify and improve:
 - levels of fitness for the expedition;
 - group dynamics and team work;
 - personal confidence in the skills required;
 - risk-benefit assessment and risk management awareness.
- There should be sufficient flexibility within the expedition programme to allow for variations in final fitness levels. Where the provider delivers preparatory adventurous activities within the UK and where legally required to do so, these activities must comply with the requirements under the Adventure Activities Licensing Service (AALS).
- Where such preparatory activities take place overseas (or are otherwise out of scope of the AALS) the provider should ensure that the systems and procedures in place for the activities follow nationally accepted standards of good practice.
- Where the establishment or another provider delivers preparatory activities, then these should comply with the establishment's guidance requirements.

Overseas Expeditions - Planning

- The expedition plans should be based on educational aims and be guided by a risk-benefit assessment process and should cover all elements of the programme. The plan should be current and prepared by a person with a credible and proven level of competence and experience. It should include all the elements set out below:
 - Planning for both the proposed and other possible activities, including any contingency activities (i.e. Plan B)
 - Site specific considerations
 - Route choices
 - Transport arrangements
 - Accommodation arrangements, including suitability, security, safety precautions, and emergency evacuation
 - Rest and relaxation periods arrangements
 - Suitable arrangements for any remote supervision
 - Emergency procedures and evacuation
 - All other areas where a known significant hazard exists
 - Consideration of political stability and cultural issues, including food/drink, local customs, religion, expected behaviour/dress, gender issues, sanitary arrangements, corruption and local financial arrangements.
- The generic visit plans (as above) should be available from the provider at an early stage in the planning process. This should be prior to any contracts being signed by the school/establishment and before parents make a commitment to the venture.
- In the final stages of planning, generic plans should be supplemented by those that are event specific. This final process is the responsibility of the provider's appointed Expedition Leader, following liaison with the establishment's Visit Leader. It must take place before the commencement of the expedition and can only take place when the elements stated below are in place:
 - Training sessions have been completed
 - The Expedition Leader has been appointed and has worked with the group
 - The medical information of participants is known
 - Participants' fitness and competence levels have been assessed
 - Participant details are known e.g. health and medical details, water confidence etc.
 - The current environmental and political situation in the country to be visited is known and advice taken from the Foreign and Commonwealth Office website
- Where young people are required to make decisions (e.g. regarding accommodation, transport, guides, etc.) the provider must have carried out all risk assessments in advance (although this may be unknown to students). Journeying into unfamiliar territory or

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions) situations is a reasonable expectation for the group members. Only in exceptional circumstances should it be the case for staff leading the venture.

- Visit leaders from the school/establishment still have a responsibility for completing a written risk assessment (although this can incorporate and need not duplicate information from the provider) and for checking that any external provider has suitable and sufficient safety management systems in place. Wherever possible all group members should be involved in the planning of the venture and the risk assessment/management process;
- It is accepted that such environments are often less predictable, and dynamic risk assessment and management may take on a higher than usual significance, and risks must be monitored and managed throughout the venture. Where appropriate, activities must be modified or curtailed to suit changed or changing circumstances. All members of the party have a duty to monitor risks on an ongoing basis and to the best of their ability. However, the responsibility for this rests with the leadership team. In the majority of instances, including where technical issues are concerned, this will usually be the responsibility of the provider's appointed Expedition Leader.

Overseas Expeditions - Emergency Procedures and Evacuation

- Both the school/establishment and the provider should agree emergency procedures and contingency plans before departure. They should be in writing and fully understood by all involved in the expedition, including the young people. It is a key responsibility of the provider's Expedition Leader to ensure that appropriate emergency and evacuation procedures are in place. The following elements are essential:
 - current and accurate knowledge of the scope and limitations of the rescue services available;
 - understanding of the full implications of any individual or group evacuation in the event of an incident or injury - the evacuation of a student will normally require an accompanying member of staff, with all its implications for the remaining group members;
 - satisfactory assurances that the rescue and evacuation procedures are fully considered in the risk-benefit assessment - where a life-threatening injury or illness cannot be evacuated with efficiency and effectiveness, the area is inappropriate;
 - the Assistant Leader's competence should be sufficient to successfully apply the emergency or incident management strategies, should the Expedition Leader and the Visit Leader become incapacitated.
- The Provider must use the most suitable emergency communication system that is active in the region(s) to be visited. Where mobile or satellite phones are known to operate in a region then this is the preferred choice. In remote locations, where there is only partial phone coverage, then this must be supplemented by another form of emergency communication, such as radio net or deployment of a local runner. Use of a member (or members) of the group to carry out the function of a runner should only be considered as an absolute last resort and plans should not be based on using group members in this way.
- If a young person or adult with a life-threatening illness or injury cannot be efficiently and effectively evacuated from the proposed expedition area, then the location should normally be considered inappropriate, and an alternative location or activity sought;

Overseas Expeditions - Swimming

- Any swimming activities, including open water bathing, require special consideration. The likely age range of the expedition participants is such that it is unrealistic to ignore the likelihood of a demand for swimming or bathing activity, but it must be appropriately supervised. The visit plan should therefore consider the opportunities and merits of young people experiencing, and learning about the hazards of water and staff should be conversant with the latest guidance provided by the RLSS and ROPSA. The RLSS Water Safety Management Programme provides excellent training for Expedition Leaders and Assistant Leaders.
- If such activities are to take place, it must be guided by local knowledge and there must be clarity as to whether the overall responsibility for participant safety rests with the Visit Leader or the Expedition Leader, or if this responsibility is to be collaborative.

Visits Guidance (VG)

11. Overseas Visits (including exchange visits and expeditions)

- If the responsibility for swimming rests with the provider, then the establishment and parents should be informed in advance of the provider's policy. As a minimum, the Expedition Leader must provide an appropriate level of supervision and implement adequate control measures.
- If the responsibility for swimming rests with the establishment, then the activity may only take place if the Visit leader can ensure that the supervision meets the requirements of their employer's guidance.
- If the responsibility for swimming is shared collaboratively between the provider and establishment, both should agree arrangements in advance, based on a combination of the above.
- An on-site risk benefit assessment must be carried out immediately prior to open water swimming activity, to take account of water levels, speed of flow, tides, rescue procedures and any other relevant hazard.
- There must be limits set and recall systems which are clearly understood.
- Open water swimming must be a planned, risk managed and parentally agreed activity, not a spur of the moment decision.

Overseas Expeditions - Acute Mountain Sickness - AMS

- Providers should ensure that their appointed Expedition Leaders are specifically competent in working at altitude and aware of the following guidelines.
- Above 3,000m, sleeping altitudes should usually be increased by no more than 300-600m per day and periods of descent should be included to aid acclimatisation.
- It is good practice to plan for a rest day for every 1,000m of elevation gained.
- Where circumstances permit, the itinerary should be flexible to allow rest days without further ascent.
- It should be clearly understood that AMS is very serious. Where possible, if the early stages of AMS is suspected, then descent is the best option and that any medical treatment requires specific high altitude first aid training and knowledge.

Overseas expeditions -further information

- For further important information regarding Overseas Expeditions that are organised and led by external commercial providers, see information provided by the Outdoor Education Advisers Panel entitled "Guidance for Overseas Expeditions" which is available on www.eriding.net > Educational/Offsite visits section – see link below:
http://www.eriding.net/educ_visits/guidelines.shtml#visit_safety_guidelines.
This document outlines the essential elements that must be agreed by all parties involved in the organisation of an Overseas Expedition. The document provides a vital framework for discussions between the provider and school/establishment client, and external commercial providers are required to state clearly if they are unable or unwilling to adopt the measures and conditions outlined within it.

11.22 Ski/snowsport visits

For detailed information regarding ski/snowsport visits, go to chapter VG 8.28 "High Risk Activities and Environments"



Host Family Stay Information Form

Name of Host Family:	Name of Guest:
Address:	Address:

Telephone Number:	Telephone Number:
Mobile:	Mobile:

Who lives at this residence?	Names and relationship to host partner
Male Adult/s	
Female Adult/s	
Males under 18 (state ages)	
Females under 18 (state ages)	

Are there any regular visitors likely to have significant contact with your guest? Please give names, gender, relationship to household and ages if under 18	Yes/No

I confirm that:	Our guest will have their own bedroom	Yes/No
	Or will share with their exchange partner who is of same sex and similar age	Yes/No
	Our guest will have access to private toilet and bathroom facilities	Yes/No
	If our guest is vegetarian, vegan, has a nut allergy or dietary needs this can be accommodated	Yes/No
	When a private family vehicle is used to transport a young person, this will only take place when the vehicle is:	
	Roadworthy	Yes/No
	Appropriately insured	Yes/No
	Driven by a driver approved by both sides	Yes/No

Names of specified drivers:	

I confirm the statements made above are correct and I accept responsibility/duty of care for caring for this student in a safe and secure environment. I agree to any necessary checks.	
Signed:	Date:

**Fiche de renseignements sur
 les familles d'accueil du séjour**

Nom de la famille d'accueil :		Nom de l'invité:	
Adresse :		Adresse :	
(a) Numéro de téléphone fixe :		Numéro de téléphone fixe :	
Numéro de portable :		Numéro de portable :	
Qui habite dans ce logement?	Noms et liens de parenté avec le jeune hôte		
Hommes de plus de 18 ans			
Femmes de plus de 18 ans			
Hommes de moins de 18 (donnez l'âge exact)			
Femmes de moins de 18 (donnez l'âge exact)			
A la maison, l'invité sera-t-il en contact régulier avec d'autres personnes? Veuillez donner les noms, sexes, la nature des liens avec la famille et les âges si en dessous de 18 ans.			Oui/Non
Je confirme que :	L'invité aura sa propre chambre	Oui/Non	
	L'invité partagera la chambre de son correspondant qui est du même sexe et du même âge	Oui/Non	
	Notre invité aura accès à une salle de bains et des toilettes privés	Oui/Non	
	Si notre invité est végétarien, végétalien ou a une allergie aux noix ou autre régime particulier, cela ne sera pas un problème.	Oui/Non	
	Quand la famille d'accueil emmène son jeune invité dans un de ses véhicules, cela ne se fera qu'aux conditions suivantes :		
	Véhicule en bon état de marche	Oui/Non	
	Assuré correctement	Oui/Non	
	Les 2 parties seront satisfaites du choix du conducteur	Oui/Non	
Noms des conducteurs :			
Je confirme l'exactitude des déclarations ci-dessus et j'accepte d'être responsable du bien-être et de la sécurité de cet élève pendant la durée de son séjour. J'accepte tout contrôle jugé nécessaire.			
Signature :		Date :	



Gastfamilien-Unterkunft Informationsformular

Name der Gastgeberfamilie:	Name des Gastes:
Adresse:	Adresse:
Telefonnummer:	Telefonnummer:
Handynummer:	Handynummer:

Wer lebt in diesem Wohnsitz?	Name und Beziehung zum Gastpartner
Männliche/r Erwachsene/r	
Weibliche Erwachsene	
Männliche Personen unter 18 (mit Altersangabe/n)	
Weibliche Personen unter 18 (mit Altersangabe/n)	

Gibt es reguläre Besucher der Familie, welche nennenswerten Kontakt mit Ihrem Gast haben werden? Bitte geben sie Namen, Geschlecht, Beziehung zum Haushalt und Alter an, falls unter 18.	Ja/Nein

Ich bestätige, dass:		Ja/Nein
	Unser Gast ein eigenes Schlafzimmer haben wird	Ja/Nein
	Unser Gast dieses mit einem Austauschpartner gleichen Geschlechts und vergleichbaren Alters teilen wird	Ja/Nein
	Unser Gast Zugang zu privater Toilette und Badezimmer haben wird	Ja/Nein
	Falls unser Gast Vegetarier/in oder Veganer/in ist, eine Nußallergie oder spezielle Diätbedürfnisse hat, kann dem entsprochen werden.	Ja/Nein
	Ein privates Familienfahrzeug zum Transport einer jungen Person nur dann benutzt wird, wenn dieses:	
	Strassentauglich ist	Ja/Nein
	Angemessen versichert ist	Ja/Nein
	Von einem Fahrer gefahren wird, dem beide Parteien zustimmen	Ja/Nein

Namen der festgelegten Fahrer:

Ich bestätige, dass die obigen Aussagen korrekt sind und ich die Verantwortung/Sorgepflicht für diese/n Schüler/in in einem sicheren und gesicherten Umfeld akzeptiere. Ich stimme notwendigen Nachprüfungen zu.	
Unterschrift:	Datum:



Familia Anfitriona Formulario

Nombre de la Familia Anfitriona:		Nombre del Huesped:	
Dirección:		Dirección:	

Número de Teléfono:		Número de Teléfono	
Móvil:		Móvil:	

¿Quién vive en este domicilio?	Nombre y parentesco con el/la anfitrión/a
Varones Adultos	
Mujeres Adultas	
Varones menores de 18 (edad)	
Mujeres menores de 18 (edad)	

¿Hay aVGún visitante regular que pueda tener contacto con el huesped? Por favor dé nombres, sexo, relación con la familia y edad si es menor de 18	Si/No

Confirmando que:	Nuestro huesped tendrá habitación propia	Si/No
	O compartira habitación con su compañero de intercambio del mismo sexo y edad similar	Si/No
	Nuestro huesped tendrá acceso a un baño privado	Si/No
	En el caso de tener un huesped vegetariano, con aVGuna alergia o con aVGuna dieta especial se tendrá en cuenta	Si/No
	Solo se podrá transportar a los jovenes en un vehículo propio si esta:	
	Apto para circular	Si/No
	Adecuadamente asegurado	Si/No
	Conducido por un conductor aprobado por ambas familias	Si/No

Nombres de los conductores:	

Confirmando que toda la información es correcta y acepto la responsabilidad de cuidar a este estudiante en un ambiente seguro. Estoy de acuerdo con cualquier verificación necesaria.



informazioni della famiglia ospitando durante il soggiorno

Nome della ospita famiglia:		Il nome di Ospite :	
Indirizzo :		Indirizzo:	

(b) Numero di Telefono:		Numero di Telefono:	
Numero di Cellulare:		Numero di Cellulare:	

Chi vive a questa residenza?	I nomi ed il rapporto dello giovane partner ospitato
Gli uomini di più di 18 anni Le donne di più di 18 anni	
Gli uomini meno di 18 anni	
Le donne meno di 18 anni	

Sono lì qualunque visitatori regolari probabili per avere il contatto significativo con il suo ospite? Per favore di dare dei nomi, il genere, il rapporto alla famiglia e le età se sotto 18	Si / No
Confermo :	Si / No
Il nostro ospite avrà la loro propria camera da letto	Si / No
O dividerà con il loro partner di scambio che è di stesso sesso e l'età simile	Si / No
Il nostro ospite avrà accesso alle facilità di gabinetto e stanza da bagno private	Si / No
Se il nostro ospite è vegetariano, veganiano, ha un'allergia di noce o i bisogni dietetici che questo può essere ospitato	Si / No
Quando un veicolo di famiglia privato è usato per trasportare una giovane persona, questo avrà luogo solo quando il veicolo è:	
In condizioni di viaggiare	Si / No
Appropriatamente assicurato	Si / No
I due partiti saranno soddisfatti della scelta dell'autista	Si / No

I nomi di autisti specificati:	
--------------------------------	--

Confermo le dichiarazioni fatte al di sopra sono corrette ed accetto il responsabilità di cura ed per curare questo studente in un ambiente sicuro. Convengo a qualunque assegni necessari.	
Firmato :	Data :